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Foreign Crops and MARKETS

VOLUME 53 NUMBER 19

World Cotton Crop Small For Second Year; About 30 Percent Below Prewar. U. S. Crop Seen Lowest Since 1921 (Page 282)

World Corn Crop Forecast at Record Level, Largely Due to Bumper U. S. Crop. Larger Export Supplies To Be Available for Deficit Areas (Page 228)

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Issued by the OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE, WASHINGTON, D.C.

LATE NEWS

The Government of India has raised the support price for cotton by 80 rupees per candy (3.08 cents per pound) for Jarila fine 3/4 inch and pro rata for other types, under an official ordinance issued on October 26, 1946, effective immediately. The support price for Jarila is thus raised to 430 rupees (16.54 cents).

This ordinance institutes an export tax of 20 rupees per bale (1.5 cents per pound) and fixed the export quota for September-December 1946 at 200,000 Indian bales (167,000 bales of 478 pounds) including 15,000 for the United States through commercial agencies and 300,000 (251,000 standard bales) for Japan through contract with the Government of India. A quota of 500,000 bales (418,000) for all destinations was fixed for the 4 months beginning January 1, 1947. Ceiling prices for cotton remain unchanged at 530 rupees (20.39 cents) for Jarila fine 3/4 inch with variations for other varieties, and the ban against exports of cotton with a staple length of more than 11/16 inch was continued.

The lower seasonal duty on onion imports into Cuba normally in effect June 15 to November 14 has been extended to November 30 for the present season by action of the Cuban Cabinet.

Argentina's first serious frost in 25 years at this season of the year occurred in the Rio Negro Valley at the end of the second week in October. Although too early for accurate quantitative determination, reliable authorities believe that only 20 percent of the wine-fruit crop and 35 percent of the tree-fruit crops can now be expected.

French North Africa is not expected to have any surpluses of pulses for export during the first half of 1947, according to a statement made by the French Ministry of Food in Paris.

* * * * *

WORLD COTTON CROP SMALL FOR SECOND SUCCESSIVE YEAR

World cotton production in 1946-47 is tentatively estimated at 22,050,000 bales (of 500 pounds gross), compared with a prewar (1935-36/1939-40) average of 30,875,000 bales. For 1945-46, the revised estimate is 20,440,000 bales. With the exception of 1945-46, this is the smallest crop since 1923-24. Most of the prospective increase of 1,610,000 bales over last year's is in the Soviet Union, India, Egypt, and Southern Hemisphere countries.

A calculated increase of 1,901,000 bales in foreign production is partly offset by a decrease of 291,000 bales in the United States crop. No official estimates are yet available for the Southern Hemisphere crop, which is now only in the early stages of growth, and estimates for the Northern Hemisphere are still all preliminary. The downward revision in the world estimate for 1945-46 since the report of May 27, 1946, is due almost entirely to subsequent information from Brazil and the Soviet Union.

The world cotton area is believed to have increased in 1946-47 by nearly 2.8 million acres over 1945-46 to a total of 58,400,000 acres. This acreage increase, however, was more evenly distributed than the production increase, with 535,000 acres in the United States, 239,000 in Egypt, and 2 million indicated in early reports from the Southern Hemisphere (principally Brazil and East Africa) and India, none of which has reported the acreage actually planted for the 1946-47 crops. Higher prices for cotton and some easing of the world food situation this year are believed to be the principal factors stimulating increased cotton cultivation although increases were limited in India, Egypt, and Peru, where acreage restrictions though moderated, are still in effect.

Cotton acreage in the United States this year was increased by 535,000 acres, or 3.1 percent above the 17,241,000 acres (harvested) in 1945, despite unfavorable weather conditions at planting time--excessive rain and cool weather in the central belt and parts of Texas and Oklahoma. Extreme drought throughout the planting period in northwest Texas was a detriment in that area. The 18,316,000 acres planted in 1946 were considerably less than the official goal of 20.2 million acres announced for the 1946 crop.

Average U.S. yield in 1946 was estimated at 235.6 pounds per acre harvested, compared with 251 pounds in 1945 and a 1935-44 average of 243.2 pounds. Low yield in 1946 is attributed largely to the unfavorable weather. Drought conditions in some areas in September, caused early opening and some reduction in the top crop.

Cotton acreage and production in India have not been reported officially for 1946 but private sources indicate that favorable weather conditions in most areas may result in a small increase above the 1945-46 figures, or approximately 3,100,000 bales from about 15 million acres.

COTTON: World acreage and production by continents and countries, average 1935-39 and annual 1943-46.

Continent and country	Acreage					Production a/				
		Year beginning August 1					Year beginning August 1			
	Average 1935-39	1943	1944	1945b/	1946b/	Average 1935-39	1943	1944	1945b/	1946b/
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 acres	1,000 bales	1,000 bales	1,000 bales	1,000 bales	1,000 bales
North America:										
United States	27,788	21,652	20,009	17,241	17,776	13,149	11,427	12,230	9,015	8,724
Mexico	725	1,010	1,046	890	828	334	515	520	428	453
Haiti	-	-	-	62	62	22	13	11	11	14
British West Indies	20	16	16	-	-	5	3	4	4	-
Puerto Rico	2	10	-	-	-	1	2	1	-	-
Salvador	6	33	31	24	28	4	19	15	10	13
Nicaragua	c/ 9	4	4	5	1	5	3	3	4	1
Guatemala	-	-	7	-	-	2	-	4	3	3
Estimated total d/	28,706	22,822	21,188	18,252	18,725	13,522	11,984	12,788	9,476	9,213
South America:										
Brazil	5,562	6,200	6,000	5,000	6,000	1,956	2,700	1,626	1,425	-
Argentina	770	913	887	822	-	289	553	332	307	-
Peru e/	428	326	326	-	-	384	310	325	329	-
Paraguay	111	104	119	124	160	40	72	40	44	59
Colombia	c/ 98	124	-	-	-	23	26	30	-	-
Venezuela	c/ 50	69	58	-	-	11	10	16	18	-
Ecuador	c/ 40	39	-	-	-	13	8	7	7	9
Estimated total d/	7,061	7,777	7,532	6,513	7,650	2,716	3,685	2,376	2,160	3,000
Asia and Australia:										
Soviet Union	5,087	-	2,865	2,995	3,200	3,430	-	-	1,700	2,200
India f/	24,204	21,086	14,843	14,600	15,000	4,643	4,401	2,927	2,900	3,100
Burma	428	387	-	260	-	97	90	85	32	-
China, including Manchuria	7,038	-	5,600	5,600	5,600	2,855	1,500	1,600	1,600	1,625
Korea	564	776	752	705	-	180	205	228	163	140
Turkey	667	678	720	572	564	275	325	231	166	184
Iran	442	297	290	247	198	59	42	69	92	69
Afghanistan	-	-	-	-	-	c/ 49	20	-	20	-
Syria and Lebanon	93	35	40	43	-	31	16	13	20	-
Iraq	c/ 53	28	18	25	25	11	3	2	2	3
French Indochina	36	-	-	-	-	6	8	-	-	-
Netherlands Indies	27	-	-	-	-	c/ 9	7	11	-	-
Siam	16	-	-	-	-	7	-	-	17	-
Australia	53	16	7	8	-	11	6	1	2	-
Estimated total d/	38,931	32,058	25,792	25,322	25,790	11,670	8,143	7,020	6,741	7,443

Africa:										
Egypt	1,821	740	885	1,020	1,259	1,893	740	962	1,082	1,242
Anglo-Egyptian Sudan	439	319	347	321	-	248	175	290	206	-
Uganda	1,477	1,234	1,072	1,146	1,300	281	160	251	212	-
Tanganyika	-	-	-	-	-	50	32	21	35	30
Nyasaland	84	-	-	-	-	12	5	7	7	7
Kenya	-	-	-	-	-	13	14	13	4	-
Belgian Congo	874	-	863	-	-	172	141	175	174	-
French Equatorial Africa	c/ 390	-	667	-	-	40	79	102	85	-
French West Africa	-	-	-	-	-	29	14	21	-	-
Mozambique	-	-	-	-	-	g/ 33	94	92	-	-
Nigeria	-	-	-	-	-	36	21	13	-	-
Angola	c/ 73	-	-	-	-	13	23	-	-	-
French Morocco	1	8	7	4	-	h/	2	3	2	2
Algeria	1	7	-	-	-	h/	2	-	-	-
Union of South Africa	-	-	-	-	-	2	1	h/	h/	h/
Southern Rhodesia	c/ 2	-	6	-	-	h/	1	1	-	-
Italian Somaliland	13	-	-	-	-	3	2	-	-	-
Estimated total d/	6,126	5,043	4,995	5,193	5,720	2,828	1,512	1,981	1,990	2,280
Europe:										
Greece	168	90	80	67	127	65	12	34	27	47
Bulgaria	85	48	48	57	80	35	8	11	10	-
Italy	56	58	37	30	25	21	11	9	5	8
Spain	c/ 46	129	148	72	-	10	21	27	8	30
Rumania i/	8	77	110	128	120	2	12	22	20	9
Yugoslavia	8	-	15	-	-	3	-	-	-	-
Cyprus	11	7	4	-	-	3	2	-	1	2
Estimated total d/	383	425	443	370	515	139	71	110	73	114
Estimated world totals	81,207	68,125	59,950	55,650	58,400	30,875	25,395	24,275	20,440	22,050

Compiled from official sources, publications of The International Institute of Agriculture, and credible trade sources, and includes estimates by this Office.

a/ United States production in bales of 500 pounds gross (478 to 480 pounds net); others in bales of 478 pounds net.

b/ Preliminary.

c/ Partly estimated.

d/ All sub-totals include rough estimates for minor-producing countries not listed above and allowances for other figures not available.

e/ All figures for Peru are revised since report of November 26, 1945, by moving the entire series back 1 year as more than half the crop is picked prior to August 1 each year.

f/ Figures for 1945 and earlier years apparently do not include estimates of unpressed cotton consumed by Indian mills and cotton consumed in hand-spinning industries, usually amounting to a combined total of 600,000 to 800,000 bales.

g/ Exports.

h/ Less than 500 bales.

i/ Figures from 1943 to date are not comparable with prewar figures because of boundary changes.

This is 200,000 to 250,000 bales less than domestic mill requirements for Indian cotton in 1946-47. For three consecutive years, production has fallen short (by 200,000 to 500,000 bales) of consumption in India.

Government efforts to divert cotton land to food crops during the past 3 years have mostly taken the form of low price ceilings for cotton, favorable support prices for food commodities, special taxation of cotton land, and priorities for transportation of food commodities. An ordinance of October 26, 1946, raised floor prices by 80 rupees per candy (3.08 cents per pound) for Jarila fine 3/4 inch staple and pro rata for other types. Ceiling prices were not changed (see late cable page for details).

The 1946 crop in Egypt, equivalent to 1,242,000 bales (first estimate), represents an increase of 160,000 bales above the 1945 estimate and 500,000 bales above the low point reached in 1943. Cotton acreage restrictions, first imposed in 1941 in order to increase food production for war needs, were intensified in 1942 and 1943 but were gradually moderated in subsequent years. The increase of 239,000 acres reported for 1946 was considerably more than the 67,000 additional acres authorized this year by partial relaxation of Government acreage restrictions. The area planted to the Karnak variety was increased from 606,000 acres in 1945 to 849,000 in 1946, despite Government efforts to encourage a shift to shorter staple varieties in view of the heavy stocks of Karnak on hand.

In the Anglo-Egyptian Sudan the area planted to cotton in 1946-47 is reported to be about equal to the 321,000 acres planted in 1945-46, despite a late start following settlement of a strike on the part of workers in the Gezira area. Favorable weather conditions reported in most of East Africa this year should result in a crop somewhat larger than the 206,000 bales reported for 1945-46 when yields were below average.

The 1.3 million acres planted to cotton in Uganda in 1946-47 represent an increase of about 150,000 acres over the 1945-46 figure. Rain was excessive in many areas during August (end of planting period) and Blackarm disease appeared on a small scale, but the outlook for yield was considered generally favorable as of the middle of September. Increased acreage and anticipated improvement in yield per acre above that of a year ago, when drought prevailed, may result in a production increase of 40,000 to 50,000 bales above the 1945-46 estimate of 212,000 bales.

In the Soviet Union a cotton-production goal, equivalent to about 2,450,000 bales from 3,200,000 acres was announced by the Government in the spring of 1946, compared with an official estimate of 1,900,000 bales from 2,995,000 acres for 1945 published on May 1, 1946. Recent reports indicate that production is considerably higher than that of a year ago and may equal the goal announced. Since Soviet official calculations make use of so-called "biological" yields, a deduction of roughly 10 percent from total theoretical production has been made from the above figures in order to approximate the actual outturn of the crop at the gins.

The 1946 cotton crop in China is reported to be slightly larger than the revised estimate of 1.6 million bales for 1945. Improvement in China's cotton production since the end of the war has been slow because of unsettled political conditions urgent need for food production, lack of seed and tools, and disorganization of transportation. A larger proportion of the domestic cotton crop, however, is expected to reach Shanghai and other mill centers this year, possibly 500,000 to 800,000 bales.

Reports from Korea indicated that production in 1946 was not expected to equal the 1945 crop estimated at 163,000 bales. This is insufficient to meet the normal requirements of mills (75,000 bales in 1944) and the important home industry that usually consumes 80,000 to 120,000 bales annually. The deficiency will be partly offset by considerable stocks on hand from previous crops while the fact that mills are operating below prewar levels is tending to hold consumption in check.

The 1946 crop in Turkey, estimated at 184,000 bales, is slightly larger than last year's crop but considerably less than the prewar average of 275,000 bales. Drought in 1945 and a diversion to food crops in both years were the principal causes for the smaller crops. The 1946 crop is barely sufficient for local requirements (mills and home industries) and exportation of cotton is still prohibited by law.

Production of 69 000 bales in Iran this year did not equal domestic requirements and is considerably less than the 92,000 bales produced in 1945. Cotton production was discouraged by the Government during the war to permit increased production of food commodities.

Production in European countries, estimated at a total of 114,000 bales in 1946 was 56 percent above the 1945 estimate but only about two-thirds of the peak years, 1937 to 1940. Increases in 1946 were confined almost entirely to Greece where half the crop is irrigated and to Spain where the Government is exerting every effort to increase production of cotton. Drought in Bulgaria was reported to be as severe as in 1945 and in Rumania, much more severe. Cotton production in Italy is not expected to make appreciable gains above the present low level unless the Government returns to its prewar policy of assisting growers.

The estimate of 1945-46 crop in Brazil, which has been revised downward since the last report on world production, is now placed at 1,425,000 bales, the smallest since 1934-35. The south Brazil crop (normally 75 to 80 percent of the total) is indicated at only 950,000 bales for 1945-46, the smallest in 10 years, compared with 1,146 000 for 1944-45 and 2,235,000 for 1943-44, the record crop. The sharp decline in south Brazil in 1945-46 was attributed mainly to mild drought at planting time, excessive rain during a considerable part of the picking season, and some shift from the cultivation of cotton to higher-priced food crops. An increase of 20 to 25 percent in acreage for the 1946-47 crop now being planted is expected.

It is too early to estimate the south Brazil crop, but such an increase in acreage with a normal yield would result in a crop of nearly 1.7 million bales in 1946-47. Since production in northeast Brazil does not vary greatly from year to year the total for Brazil may be tentatively placed at about 2,100,000 bales. The 1946-47 crop in northeast Brazil is expected to be about equal to the 1945-46 estimate of 478,000 bales.

Production in Argentina in 1945-46 was handicapped by unfavorable weather--early drought and excessive late rains, and heavy insect damage. The 1945-46 estimate of 307,000 bales was the lowest since 1940-41 and followed a small crop in 1944-45. Information regarding the 1946-47 crop now in early stages of growth is not available except for reports of drought in some areas at planting time and press reports of a large invasion of locusts in northern Provinces, the Argentine cotton belt.

The 1945-46 crop in Peru, estimated at 329,000 bales, was subject to the 20-percent acreage restriction decreed by law for the 1943 and subsequent crops under the terms of the United States-Peruvian Cotton Purchase Agreement concluded about the middle of 1942. The restriction was extended to the 1945-46 crop. No information is available regarding the possible abandonment of acreage restrictions for the 1946-47 crop now being planted.

Production in Paraguay under normal conditions is expected to reach about 59,000 bales in 1946-47 from an estimated planted area of 160,000 acres, compared with 44,000 bales from 124,000 acres in 1945-46. The Government maintained relatively high support prices and purchased nearly all the cotton produced during the war years, but marketing of the 1945-46 crop was returned to commercial agencies.

Mexico's 1946 crop of 453,000 bales is somewhat larger than was expected earlier and about 25,000 bales more than the 1945 crop. Higher prices for food crops, restrictions on credit for cotton growers, and a small reduction in Government-support prices were the principal factors in a decline in acreage below the level of recent years. A sharp reduction in the Laguna district (usually the largest producing area) was more than offset by increases in the Matamoros and Mexicali districts.

Depletion of stocks by record exports in 1945-46 caused the Government to limit export licenses since about July 5, 1946, to cotton of Low Middling or below from the 1946 crop.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock statistics. For this report the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, A. W. Palmer, P. K. Norris, C. H. Barber, R. J. Manovill, D. M. Crawford, and Lazar Volin.

WORLD CORN CROP FORECAST AT RECORD LEVEL 1/

The world corn crop in 1946-47 is forecast at about 5.5 billion bushels, the largest crop on record, according to the Office of Foreign Agricultural Relations. As tentatively estimated, the crop would be about 8 percent above the 1945 crop and 15 percent larger than the 1935-39 average. The bulk of the increase is attributed to the record crop in the United States. Smaller-than-average corn crops for Europe and Soviet Russia are largely attributed to drought damage. A below-average crop is also expected in South America, as a result of smaller acreages.

Increased corn crops this year will reduce import needs from some areas that had large requirements last year. Import needs in Mexico and the Union of South Africa were increased considerably during the 1945-46 season, as a result of sharply reduced crops, but this year the corn crops are estimated to be well above average. Prospects are also favorable in Cuba, where a below-average crop last season increased import needs for this staple item in the diet. Increased import needs in these countries, as well as in some European countries during the past season, could not be fully met from limited export supplies in the United States and Argentina, the principal exporting countries. Both the low quality and reduction in size of the United States corn crop affected the amount available for export during the past season.

The quality of the 1946 United States crop is good, and larger quantities should be available for export than in 1945-46. Export supplies will serve to supplement the total quantity of grain available for shipment for direct use as food, though the possibilities for substituting corn for wheat and rice are limited. The bulk of the corn movement will take place late in the season. Corn exports from Argentina in the coming season are expected to exceed the movement of about 45 million bushels during the current season, by a considerable amount. Europe's import needs are expected to be large again this season, since corn crops are again small. Needs in India and Japan are also expected to be sizable, in order to offset the low level of rice supplies available for import.

Corn production in North and Central America is about 45 percent larger than average, with the most significant gain in the United States, where production has increased over a billion bushels since the average period, despite some decline in acreage. Higher yielding hybrid corn accounts for much of the increase, 1946 yields being 11.6 bushels per acre larger than during 1935-39. The United States crop this year represents about 65 percent of the world total. A substantial increase is reported for Mexico and some increase for Canada.

European corn production is estimated to be only about 60 percent of average, and even less than the small 1945 harvest. The poor outturn this year was largely due to sharp reductions in yields, especially in the

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1/ Text is continued on page 297. Table follows on next page.

CORN: Acreage, yield per acre, and production in specified countries, average 1935-39, annual 1944-46 a/

Continent and country	Acreage b/				Yield per acre	Production			
	Average 1935-39	1944	1945	1946 Pre-liminary	Average 1935-39	Average 1935-39	1944	1945	1946 Pre-liminary
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
North and Central America:									
United States	92,699	97,078	91,202	91,487	25.0	2,315,539	3,203,310	3,018,410	3,374,428
Canada	172	270	237	246	40.8	7,010	11,700	10,365	10,147
Mexico	7,501	8,650	7,990	(8,900)	9.0	67,523	96,077	(75,000)	(92,500)
Guatemala	(1,000)	-	(1,200)	-	15.7	(15,700)	-	(17,900)	-
El Salvador	288	(340)	(325)	-	17.9	5,155	(5,000)	-	-
Honduras	c/ 258	-	-	-	c/ 14.0	3,717	-	-	-
Cuba	(360)	(400)	(360)	(400)	(16.7)	(6,000)	(6,250)	(5,200)	(6,000)
Nicaragua	c/ 86	219	190	(150)	c/ 6.7	c/ 578	(2,000)	1,042	(1,500)
Estimated total d/	102,920	109,180	102,410	103,600	-	2,427,000	3,355,000	3,143,000	3,520,000
Europe:									
Italy	3,639	(3,150)	(3,350)	(3,250)	31.3	113,881	(86,000)	(70,000)	(89,000)
Spain	c/ 1,094	892	870	(980)	c/ 28.4	c/ 31,076	23,149	(18,560)	(24,000)
Portugal	997	1,150	1,448	1,557	13.1	13.081	14,358	12,204	(15,000)
France	839	e/ 494	556	(550)	26.9	22,559	e/ 8,858	(6,300)	(10,000)
Greece	650	-	509	594	15.5	10,078	-	(6,300)	(7,900)
Germany	89	-	-	-	(44.9)	(4,000)	-	-	-
Austria	165	-	-	-	40.0	6,603	-	-	-
Czechoslovakia f/	c/ 419	-	(375)	(360)	c/ 28.2	c/ 11,807	-	-	(9,000)
Poland	c/ 224	-	-	-	c/ 20.2	c/ 4,535	-	-	-
Bulgaria g/	1,733	1,860	1,718	1,644	18.0	31,173	29,807	9,460	19,058
Hungary	2,925	2,511	3,017	3,111	31.5	92,007	88,184	74,051	64,839
Rumania	12,611	-	-	-	16.8	211,890	-	-	-
Yugoslavia	6,573	-	-	-	26.8	175,861	-	-	-
Albania	235	(200)	205	(250)	21.6	5,067	(3,900)	(3,400)	(6,000)
Estimated total d/	32,200	26,670	27,500	28,270	-	734,000	578,000	479,000	445,000
Soviet Union	7,041	-	-	-	-	-	-	-	-
Africa:									
Union of South Africa	h/ 5,909	-	-	-	-	80,132	65,679	66,954	-
Angola	c/ 1,427	-	-	-	c/ 9.2	c/ 13,084	-	-	-
Belgian Congo	(200)	-	-	-	(25.0)	(5,000)	-	-	-
Southern Rhodesia h/	268	224	-	-	22.1	5,923	5,484	-	-
Basutoland	350	-	-	-	8.1	2,822	-	-	-
Madagascar	263	198	222	235	15.9	4,189	2,362	2,559	2,441
Kenya h/	c/ 108	121	132	-	c/ 31.0	c/ 3,350	2,997	3,318	-
Egypt	1,599	1,962	1,950	1,791	39.5	63,229	61,370	66,821	62,004
French Morocco	1,112	(1,250)	1,223	1,208	7.6	8,505	4,724	1,505	11,547
French West Africa	c/ 1,732	-	-	-	c/ 12.4	c/ 21,473	-	-	-
Estimated total d/	25,500	19,900	20,000	19,800	-	260,000	235,000	240,000	270,000

Asia:									
Turkey	1,098	1,549	1,428	1,260	20.9	22,971	19,999	11,614	22,558
India	8,265	8,712	10,397	10,298	13.1	108,128	118,080	127,960	123,360
Burma	217	-	-	-	7.6	1,640	-	-	-
Indochina	1,019	-	-	-	20.8	21,168	-	-	-
China	c/ 11,950	-	-	-	c/ 21.9	c/ 261,875	-	-	-
Manchuria	3,720	-	-	-	23.3	86,570	-	-	-
Japan	c/ 128	-	-	-	c/ 23.6	c/ 3,017	3,031	4,134	3,268
Chosen	c/ 321	-	-	-	c/ 13.0	c/ 4,177	-	-	-
Java and Madura	5,150	-	-	-	15.5	79,976	-	-	-
Philippine Islands	1,718	-	-	1,291	9.4	16,129	(14,000)	-	(11,823)
Estimated total d/	33,670	36,260	38,130	38,030	-	607,000	620,000	640,000	655,000
South America:									
Argentina	10,775	5,077	6,792	(8,000)	28.0	301,986	116,745	140,701	(225,000)
Brazil	10,025	-	-	-	21.5	215,161	199,713	248,647	(200,000)
Uruguay	531	459	496	(500)	9.8	5,188	2,614	5,507	(5,000)
Chile	110	112	115	(120)	22.7	2,496	2,200	2,541	(2,500)
Colombia	i/ 1,374	-	-	-	i/ 14.1	c/ 15,276	-	-	-
Estimated total d/	24,460	18,300	20,900	21,500	-	565,000	370,000	450,000	480,000
Oceania:									
Australia	314	257	(275)	(300)	22.4	7,030	6,398	(5,500)	(6,500)
New Zealand	7	8	6	(8)	45.4	318	443	300	(400)
Estimated world total d/	226,100	215,600	214,500	217,000	-	4,732,000	5,235,000	5,035,000	5,450,000

Office of Foreign Agricultural Relations. Compiled from official sources and the International Institute of Agriculture where available; otherwise Office of Foreign Agricultural Relations estimates (shown in parentheses) based on foreign service reports and other information. Estimates for countries having changed boundaries have been adjusted to prewar basis except as noted.

a/ Years shown refer to year of harvest in the Northern Hemisphere. Harvests of Southern Hemisphere countries are combined with those of the Northern Hemisphere which immediately precede; thus, the crop harvested in the Southern Hemisphere in the spring of 1946 is combined with the Northern Hemisphere crops harvested late in 1945. b/ Figures refer to harvested areas as far as possible. c/ Average of less than 5 years. d/ Estimated totals include allowances for missing data for countries shown and for other producing countries not shown. e/ Official estimate adjusted to include Alsace Lorraine. f/ Includes corn in mixed cultivation. g/ Estimates for 1944 to date take account of boundary changes and are, therefore, not strictly comparable with earlier years shown. h/ European cultivation only. i/ One year only.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS, AND FEEDS

JAPAN'S RICE HARVEST PROGRESSES FAVORABLY

The 1946 rice crop of Japan is officially estimated at 549 million bushels (19.8 billion pounds brown rice), compared with an unofficial estimate of 457 million bushels of (16.5 billion pounds) in the preceding year and 596 million bushels (21.6 billion pounds) for the prewar (1935-39) average. Weather conditions continued favorable for production well into October. About one-third of the harvest was completed on October 1, and the rest was progressing under favorable circumstances. Early planted rice is being collected and new rice is beginning to reach urban areas.

Even though Japan's rice production in 1946 is substantially larger than last year's, it is 8 percent less than the prewar average. Furthermore, this crop is equal to only 78 percent of Japan's prewar rice utilization, which means that supplies available for 1947 from the domestic crop are about 5 1/2 billion pounds less than the prewar utilization. Rice imports probably cannot be obtained next year from Korea and Formosa, the prewar sources for Japanese imports, since production in those countries is estimated to be about sufficient for domestic needs. Before the war, Japan imported one-sixth of its rice.

JAPAN: Rice production, imports, and utilization, average 1930 to 1939, annual 1940 to 1946.

Year	Acreage	Yield per acre	Production		Net imports a/b/	Apparent utilization a/b/
			Rough	Brown		
	1,000 acres	bushels	1,000 bushels	Million pounds	Million pounds	Million pounds
Average -						
1930 to 1934	7,887	70.6	557,217	20,160	3,843	24,003
1935 to 1939	7,862	75.8	595,845	21,558	3,891	25,449
1940	7,739	71.3	554,978	20,079	4,662	24,741
1945 c/	7,092	64.4	457,007	16,535	d/	16,535
1946	-	-	543,530	19,846	-	-

Compiled from official sources, except as noted.

a/ In terms of brown rice converted at 80.4 percent of rough rice.

b/ Calendar year following harvest.

c/ Unofficial estimate. d/ Negligible.

CUBAN RICE IMPORTS FAR BELOW NEEDS

Despite the subsidy of $1.52 per 100 pounds on United States rice, approved October 9, Cuban rice imports during October have been negligible. Imports during September were only 5.7 million pounds milled--equal to consumption requirements for 4 days, compared with 34.3 million for the same month a year ago. Of the September total, less than 1 million pounds was imported from the United States. The decline has been due primarily to the maritime strike and uncertainty in regard to rice prices in the United States. As a result of the drop in rice stocks in recent weeks, consumers' supplies in retail stores are difficult to find and virtually all sales are made at higher-than-ceiling prices.

FATS AND OILS

NICARAGUA EXTENDS SESAME PLANTINGS

Nicaraguan sesame-seed production for 1946-47 is estimated at 7,800 short tons from 21,000 acres, an increase of 63 percent over the 1945-46 crop of 4,800 tons. The area planted to sesame was nearly double that of a year ago as a result of favorable prices abroad, no export restrictions, and the lack of rainfall during the months of June, July, and August, which prevented large scale plantings of corn or other crops less resistant to drought.

Although a comparatively new crop, sesame has become in value the second most important cultivated crop for export in Nicaragua, being surpassed only by coffee. Planting takes place from July to October and is confined almost entirely to the western lowlands of the country, principally the Department of Leon and Chinandega. The harvesting season is from November to Febraury. Three varieties of sesame are planted, namely; Mexicana, Chirion, and No. 4016.

Reliable data on consumption of sesame-seed oil in Nicaragua are lacking, but estimates indicate that from 400 to 500 tons of seed are consumed annually for all purposes. There is only one mill with facilities for refining sesame oil, but there are about six other pressing establishments which sell the crude oil for soap manufacture or for pharmaceutical purposes.

Exports of sesame seed began in 1939 and reached their peak in 1944 when 4,940 tons were shipped. Exports for January through July 1946 amounted to 4,392 tons. Owing to the lack of necessary refining equipment, no sesame oil was exported until this year, when 42 tons had been shipped as of August 1.

Oil-producing crops other than sesame are relatively unimportant in Nicaragua. Approximately 1,000 to 3,000 tons of cottonseed are produced annually, of which small amounts have been exported since 1937. Consumption of locally produced cottonseed oil is negligible. The production of coconuts is confined generally to scattered plantings in the Bluefields area on the Atlantic coast and to offshore islands. Though consumption figures are not available, it is known that some coconut oil is used locally in the soap industry. There have been no exports of copra since 1934. During the past 10 years Nicaraguan imports of edible and inedible vegetable oils averaged 30 and 80 tons, respectively.

URUGUAY'S OILSEED CROPS REPORTED SATISFACTORY

Latest estimates place the 1946 Uruguayan sunflower-seed crop at 39,000 short tons, a decrease of only 8 percent from that of last year, despite the fact that the area was only 148,000 acres, a 36-percent decrease from the 229,000 acres in 1945. The 1946 peanut crop, however, is estimated at 5,900 tons, an increase of 10 percent over the 5,400 harvested a year ago, partly because of the larger area sown this year, namely 16,000 acres as compared with 15,000 in the past season.

Fields planted to these crops had to be extensively resown, particularly in the northern and central zones where most of the sunflower seed was planted. Owing to this reseeding and favorable weather conditions, the estimated harvests of both sunflower seed and peanuts are reported to be satisfactory.

Although no official figures for the 1946 Uruguayan flaxseed crop have as yet been received, indications are that the acreage has been increased considerably and that the crop prospects are good. The danger of locusts, however, is serious in some localities. Record prices resulting from the strong foreign demand for linseed oil have stimulated a greater interest in flaxseed production.

URUGUAY: Area and production of flaxseed, sunflower seed, and peanuts, 1946 with comparisons

Year	Flaxseed		Sunflower seed		Peanuts	
	1,000 acres	1000 bushels	1,000 acres	1,000 short tons	1,000 acres	1,000 short tons
Average - 1935-39	407	3,894	a/ 11	a/ 3	5	1
1942	337	1,808	143	34	15	4
1943	255	2,854	70	6	17	2
1944	403	4,059	127	36	12	4
1945	592	5,159	229	42	15	5
1946	b/	b/	148	39	16	6

Compiled from official sources.

a/ Four-year average. b/ Not available.

TOBACCO

MOROCCAN LEAF IMPORTS UP IN 1945

Imports of leaf tobacco into French Morocco from Western Hemisphere countries in 1945, totaled 3,018,000 pounds, compared with only 1,159,000 pounds in 1944. Brazil and the Dominican Republic were the principal suppliers of leaf in 1945, the former exporting 1,402,000 pounds, and the latter 1,118,000 pounds. Imports totaling 353,000 pounds came from the United States, principally Kentucky-Tennessee fire-cured and Maryland leaf. Imports of leaf supply about one-half of Morocco's tobacco requirements, the remainder being obtained from domestic production.

Tobacco products amounting to 922,000 pounds were imported in 1945. Cigarettes amounted to 812,000 pounds, of which 86 percent were from Algeria, and 12 percent from the United States. Imports of cut tobacco and cigars totaled 108,000 pounds and 2,000 pounds, respectively, also principally from Algeria.

TRINIDAD'S LEAF IMPORTS LARGELY FROM CANADA

Trinidad's imports of leaf tobacco for the first half of 1946 totaled 676,000 pounds, of which 577,000 pounds, or about 85 percent originated in Canada. The United States supplied 99,000 pounds. In prewar years most of Trinidad's imports of leaf were of United States origin, but in recent years, emphasis has been placed on trading within the sterling area. Canada, therefore, has become the principal source of supply.

Imports of cigarettes during the first half of 1946 totaled 38,417 pounds--practically all from the United Kingdom. American cigarettes for commercial sales are prohibited from entry in order to conserve exchange needed for more essential commodities. Imports of duty-free cigarettes, for United States armed forces stationed in the Colony, are permitted.

FRUITS, VEGETABLES, AND NUTS

WORLD DRIED-APRICOT PACK SLIGHTLY LARGER [1]

The 1946 preliminary estimate of dried-apricot production in the United States, Spain, Australia, and other leading commercial producing countries is 19,900 short tons, compared with 13,200 tons in 1945 (revised). This is 33 percent below the 10-year (1935-44) average of 30,000 tons.

Based on present trade estimates, output in the United States, which accounts for about 75 percent of the world total, is more than twice as large as the 1945 pack.

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[1] A more extensive statement on this subject is available upon request to the Division of Foreign Information and Statistics, Office of Foreign Agricultural relations.

The estimate is still tentative and subject to revision when outturn checks become available. Output in Australia showed a modest increase, but that in Spain, South Africa, and Argentina declined heavily.

APRICOTS, DRIED: Estimated commercial production in specified countries, averages 1935-44, annual 1943-46
(Rounded to nearest 100 short tons)

Year	Argentina	Australia	Chile	Spain	South Africa	Syria	Foreign total	United States	World total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average -									
1935-44 ..	a/	1,800	b/	2,400	1,200	800	c/6,200	23,800	c/ 30,000
1940-44 ..	200	1,900	b/	4,500	800	700	d/8,100	16,700	d/ 24,800
1943	400	1,400	b/	5,500	700	1,000	9,000	6,600	15,600
1944	200	2,100	b/	9,600	900	800	13,600	25,800	f/ 39,400
1945 e/ ...	f/500	f/900	100	2,600	700	f/600	5,400	f7,800	f/ 13,200
1946 e/ ...	200	1,300	100	1,500	200	600	3,900	16,000	19,900

Compiled from trade and official sources
a/ Not available. b/ Less than 100 short tons. c/ Exclude Chile and Argentina. d/ Exclude Chile. e/ Preliminary. f/ Revised.

In addition to the countries listed in the preceding table, dried apricots are produced in varying amounts in practically all countries bordering the Mediterranean and in the Near East. The Soviet Union's production is of unknown quantity. Iran has a sizable output, but a large percentage is consumed domestically. . Complete and accurate data on the Iranian industry, however, are not available at this time.

During the 1946-47 marketing season, the world's exportable supply of dried apricots is definitely limited, with the United States and possibly Syria the only potential suppliers of more than very modest quantities for shipment abroad. In Spain, the only country with a carry-over from the 1945 pack, production has already been contracted for by the British.

CUBA'S PROCESSED FRUIT, VEGETABLE PACK LARGER

Cuba's 1946 pack of processed fruits and vegetables may total 50,000 short tons, according to early estimates, about 50 percent greater than the previous record pack of 33,000 tons in 1942. A further increase in the volume of fruits and vegetables processed in Cuba is expected, as some five new processing plants are reported to be under construction, and plans for others are being drawn.

Canned pineapple is forecast at 20,000 tons, or about 1 million cases, an increase of nearly 50 percent over the previous record of about 700,000 cases packed in 1943, and more than double the 1945 production. About 80 percent of the current pineapple pack is reported to consist of crushed Red Spanish pineapple in natural juice, packed in No. 10 cans.

The frozen pineapple pack may total 3.5 million pounds and the pack of pineapple in brine or sulfur dioxide is placed at about 5,000 barrels, compared with an estimated 12,000 barrels in 1945.

The 1946 pack of canned tomato products is estimated at about 360,000 cases, with a gross weight of 14.7 million pounds, mostly puree and paste. The canned pimento pack of 118,000 cases is about double the quantity processed in 1945.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Spot prices of certain foreign growths and qualities in specific markets

Market location, kind, and quality	Date 1946	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U. S. cents per pound
Alexandria		Kantar			
Ashmouni, F.G.F.	10-24	99.05 lbs.	Tallari	44.00	36.70
Giza 7, F.G.F.	10-24	99.05 lbs.	Tallari	42.00	35.03
Karnak, F.G.F.	10-24	99.05 lbs.	Tallari	39.75	33.16
Bombay		Candy			
Jarila, fine	10-24	784 lbs.	Rupee	436.00	16.77
Kampala, East African	10-24	784 lbs.	Rupee	850.00	32.69
Buenos Aires		Metric ton			
Type B	10-26	2204.6 lbs.	Peso	2110.00	28.50
Lima		Sp. quintal			
Tanguis, Type 5		101.4 lbs.	Sol	184.00	27.91
Recife		Arroba			
Mata, Type 5	10-25	33.07 lbs.	Cruzeiro	125.00	20.43
Sertao, Type 5	10-25	33.07 lbs.	Cruzeiro	130.00	21.25
Sao Paulo		Arroba			
Sao Paulo, Type 5	10-25	33.07 lbs.	Crueziro	163.50	26.72
Torreon		Sp. quintal			
Middling, 15/16"	10-25	101.4 lbs.	Peso	148.75	30.18

Compiled from weekly cables from representatives abroad.

LIVESTOCK AND ANIMAL PRODUCTS

ZEBU-BULL EXPORTS CONTROLLED IN MEXICO

According to a recent Mexican decree, Zebu bulls recently brought to the mainland of Mexico from Sacrificio Island in Vera Cruz harbor shall not be exported until expiration of 1 year beginning October 25, and then exports can be made only upon permit granted by the Minister of Agriculture.

Before such permits are issued animals must be identified, pass sanitary inspection, and be issued sanitary export certificates.

As a further precautionary measure against the spread of any disease, the decree also requires the registration of these animals by the Minister of Agriculture, showing the name of owner and location of animals. Owners must report sickness or death of animals and Ministry of Agriculture veterinarians must make periodic inspection. Heavy fines are imposed if provisions of decree are not complied with by owners, custom brokers, or individuals. Federal officials may be dismissed if they fail to carry out terms of the decree.

DANISH HOG NUMBERS SLIGHTLY LARGER

The total number of hogs in Denmark on October 5 is reported at 1,876,000 head, compared with 1,818,000 6 weeks earlier and 1,798,000 on the same date last year. Weaned pigs and slaughter hogs account for much of the increase. The proportion of these weighing more than 132 pounds is much greater than in recent months.

The number of suckling pigs was 419,000 head, showing a seasonal increase because of fall farrowings. This is the same as in the first months of the spring pig crop, but 15 percent less than a year earlier. Sow numbers at 191,000 were 4,000 less than in March and 22,000 less than in October 1945.

DENMARK: Hog numbers October 5, 1946, with comparisons

Date	Sows: Bred	Sows: Total	Sucklings pigs	Boars	Pigs and slaughter hogs	Total
	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head	1,000 head
October 7, 1944	116	195	417	10	1,526	2,148
October 6, 1945	128	213	492	9	1,084	1,798
October 5, 1946	113	191	419	9	1,257	1,876

Compiled from official sources.

UNITED KINGDOM SEEKS DANISH BEEF

Danish chilled and frozen beef and veal formerly restricted may now be imported into the United Kingdom, according to an announcement of the British Legation at Copenhagen. Danish export control authorities, however, see little immediate possibility of a large volume. Facilities for refrigerating meat for export are fully utilized in meeting present commitments. Any additional quantities will not be large, but exports to Britain will be consider in framing Danish 1947 allocations. The British A rmy in Germany is currently receiving shipments of Danish beef, and some of this may be diverted to the United Kingdom.

GRAINS, GRAIN PRODUCTS, AND FEEDS

WORLD CORN CROP FORECAST AT RECORD LEVEL

(Continued from page 288)

important producing Balkan countries, where drought took a heavy toll of the corn crop. European acreage, though larger than a year ago, was still about 10 percent below average.

The acreage planted to corn in Soviet Russia declined considerably during the war years, according to available information, with substantial losses in yields also indicated. The 1946 yields in southern and central areas were reduced considerably, as a result of drought. Some reduction was also attributed to lack of proper seed and mechanical equipment.

Corn production in Africa is expected to be larger than in 1945 and slightly larger than average. Early season prospects are reported to be good in the Union of South Africa, normally the largest producer, and an above-average harvest is expected. Next in importance among the African countries is Egypt, where the outturn was about average.

The above-average harvest forecast in Asia is due to larger plantings, with 1946 acreage about 13 percent larger than in 1935-39. In India, the acreage is about 2 million acres larger than average.

Planting in Southern Hemisphere countries has not been completed, and no official estimates of the acreage are available. Average yields per acre are assumed on acreage estimates, based on the best available information. Current reports indicate a good gain in the Argentine acreage, though it is expected to remain well below average. If growing conditions are favorable, the crop to be harvested beginning next March would be considerably larger than the small crops of the past 2 years, though still somewhat below average. Present prospects in Brazil point to some shift from corn acreage to cotton. The corn acreage may, as a result, be smaller than average.

Estimated world corn acreage was larger than in 1945, but about 4 percent less than average. Estimates show declines from average in all important producing areas except North and Central America and Asia. In North America, an estimated gain in the Mexican acreage is largely balanced by the decline in the United States acreage. Some expansion in corn acreage is estimated for all important producing countries in Asia. In Europe, Africa, and South America, however, present estimates show a substantial percentage decline, compared with average.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Gordon P. Boals, Judith E. Downey, John A. Hopkins, and Robert J. Manovill.

MISCELLANEOUS

COFFEE EXPORTS TO EUROPE AT LOW LEVEL

For the first 6 months of 1946, the principal coffee-producing countries of the Americas exported 1.5 million bags of coffee to Europe. If shipments to Europe for the second half of 1946 continue at the same rate, the year's total will be about one-third of the prewar average. During 1945, 1.9 million bags were exported, or about one-fifth of the prewar (1935-39) average of 9 million bags.

COFFEE: Exports of principal American producing countries, average 1935-39, annual 1944, 1945, and January-June 1946

Destination	Average 1935-39				1944			
	Brazil	Colombia	Other America a/	Total	Brazil	Colombia	Other America a/	Total
	1,000 bags b/	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags	1,000 bags
United States	8,331	3,060	1,991	13,382	11,611	4,668	3,725	20,004
Other Western Hemisphere	479	150	88	717	906	243	276	1,425
Europe	5,675	761	2,584	9,020	858	12	102	972
Africa	509	c/	3	512	63	-	1	64
Asia and Oceania	98	2	9	109	118	-	-	118
Miscellaneous	3	c/	2	5	2	-	-	2
Total	15,095	3,973	4,677	23,745	13,558	4,923	4,104	22,585
	1945 d/				January-June 1946 d/			
United States	11,691	4,497	4,133	20,321	5,893	2,479	1,808	10,180
Other Western Hemisphere	916	202	253	1,371	490	109	343	942
Europe	1,554	215	92	1,861	1,197	68	219	1,484
Africa	11	-	1	12	127	-	3	130
Asia and Oceania	-	-	c/	-	7	-	1	8
Miscellaneous	-	235	29	264	1	5	31	37
Total	14,172	5,149	4,508	23,329	7,715	2,661	2,405	12,781

Official statistics of respective countries with exception of data for 1945 and 1946 which were obtained from foreign service reports.

a/ Includes Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Haiti, Honduras, Mexico, Nicaragua, Peru, and Venezuela. Peruvian exports for 1945 and January-June 1946 and Venezuelan exports January-June 1946 are estimated on basis of United States imports. b/ Bags of 132.276 pounds. c/ Less than 500 bags. d/ Preliminary.

The shortage of foreign exchange has operated to reduce European takings of American coffee. France, the principal prewar consumer of coffee in Europe, is now using coffee obtained from her colonies almost exclusively, and probably will continue to do so until the foreign exchange situation is more favorable. Portugal and Spain will rely upon colonial sources so far as possible to supply their needs.

Exports to Italy, Czechoslovakia, Poland, Greece, and Germany have been only a fraction of prewar. Coffee consumption in these countries is not expected to reach the prewar average for 3 or 4 years.

Although there is no immediate prospect of early resumption of the coffee trade with Europe on the prewar scale, there are some bright spots in the picture.

If the United Kingdom is successful in taking over the European entrepot coffee trade formerly carried on by Germany, that country in the future may import substantial quantities of American coffee, particularly Brazilian, inasmuch as Brazil has agreed to accept sterling in payment for Brazilian coffees resold by Britain for sterling. Germany, which before the war ranked next to France as a coffee consumer, also did a flourishing reexport trade in the commodity. Large amounts of coffee were transhipped from Hamburg to other European countries.

Coffee shipments from the Americas to Sweden, Switzerland, Norway, amd Belgium-Luxembourg during the first half of 1946 compare favorably with prewar exports, being 383,000 bags, 166,000 93,000 and 329,000 respectively.

TRADE CONTROLS

Britain's Ministry of Food has announced that it will continue to be the sole buyer and importer of apples, oranges, other than tangerine type, lemons, grapefruit and bananas, but the purchase and importation of other fresh fruits will be in the hands of private traders.

Guatemala lifted the export prhibition on sugar, cotton, rice, sesame, cohune, cinnamon, beans, peanuts, corn, quinine, pepper, salt, cottonseed, and copra. These products, however, will be subject to export licenses.